



AI USE POLICY FOR PROJECT TEAMS

[Organization name] — AI Use Policy for Project Teams

Replace every [bracketed item]. Add two worked examples from your own projects. Have legal and security review the final version.

Version [1.0], owner [name, role], review [quarterly].

1. Purpose and scope

This policy says how people working on [Organization] projects may use AI assistants. It exists so that AI helps our delivery without exposing data, misleading stakeholders or making decisions it should not. It applies to everyone working on our projects, including contractors, from [date].

2. Approved tools and the data each may hold

TOOL	APPROVED FOR	DATA ALLOWED	NOT ALLOWED
[Tool A, enterprise plan]	Drafting, summarizing, analysis	Internal and confidential project data	Personal data, client-restricted data
[Tool B]	Meeting notes	Internal meetings only	Client, personnel or regulator meetings
Personal or free accounts	Not approved for any project data.		

3. The five questions people ask

Can I put this document in? Yes, if the tool is approved for that data class (table above). If unsure, ask [security contact].

Example: the risk register can go into Tool A. The HR escalation email cannot go anywhere.

Can I use the output in a deliverable? Yes, after a named person has reviewed it (section 4) and you have kept a note that AI was used.

Who checks it? The author checks every output. For anything leaving the team, the [reviewer role, e.g. PMO lead] checks it too.

What if it is wrong? Correct it, note what was wrong in [the AI log], and improve the brief. Report anything that reached a stakeholder before being caught to [owner].

What must I never do with it? See section 5.

4. Review rules

- Every AI output is read in full by its author before use. Nobody forwards unread output.
- Status reports, steering papers and anything going to a client, regulator or executive are reviewed by [reviewer role].
- Numbers in AI output are checked against the source. An assistant that was told “never invent a number” can still misread one.
- Deliverables carry a short note of where AI was used, kept in [location].



5. Decisions that are never automated

AI may draft, summarize, compare and suggest. The following are always decided and communicated by a person:

- Anything about an individual: performance, hiring, discipline, allocation to or removal from a project.
- Commitments of money above [threshold], or any change to a contract.
- Anything sent to a regulator, auditor or client as a formal position.
- Safety, security or compliance determinations.
- Stop, go or cancel decisions on a project or program.

6. Briefing well

Output quality depends on the brief. Use the BRIEF method for anything that matters: Background, Role, Intent, Expectations, Format, then Review. Always include the line “Do not invent anything that is not in the sources; mark gaps as gaps.” A cheat sheet is at [location].

7. Meetings

- AI note-takers may join [internal project meetings] only, with attendees told at the start.
- They are not used in meetings involving personnel matters, clients, regulators or legal advice.
- The output is decisions, actions with owners and dates, and open questions. Decisions are confirmed by a person before they enter the decision log.

8. Logging

Teams keep a simple log in [location]: what the assistant was used for, by whom, which tool, and anything it got wrong. The log is the basis for the quarterly review and the answer to any audit question.

9. When something goes wrong

1. Stop using the output. Tell your project manager the same day.
2. If data went somewhere it should not have, tell [security contact] immediately.
3. Record it in the log. Fix the brief or the process so it does not recur.
4. No blame for reporting. Blame for hiding.

10. Quarterly review (one hour)

- Read the log. What worked, what went wrong, what people stopped using.
- Update the approved-tools table.
- Add or retire a worked example.
- Re-publish with a new version number.

11. Worked examples from our projects

[Example 1: a situation, what the person did, why it was right.]

[Example 2: a situation where AI was not used, and why.]

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